

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building

SECRETARY OF THE SENATE
10/25 PM 12:07

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The original *Employee Pre-Travel Authorization* (Form RE-1), AND
☒ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Alliance for Excellent Education

Travel date(s): October 17, 2016 - October 19, 2016

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$696.55	\$692.20	\$156.25	
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

Site visit to two Los Angeles Linked Learning schools.

10/25/16
(Date)

Karishma Merchant
(Printed name of traveler)

Karishma Merchant
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/25/16
(Date)

[Signature]
(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

U.S. SENATE
SELECT COMMITTEE ON ETHICS
16 SEP -8 AM 11:15

Name of Traveler: Karishma Merchant

Employing Office/Committee: Office of Senator Tim Kaine

Private Sponsor(s) (list all): Alliance for Excellent Education

Travel date(s): October 17-19, 2016

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Los Angeles, CA

Explain how this trip is specifically connected to the traveler's official or representational duties:

The trip will focus on successful high school redesign models in California and how they are incorporating career and technical education into the school curriculum. This trip will inform the staffer's duties as she oversees education policy legislation in the office and also staffs the Senator's Career and Technical Education Caucus. The models are reflective of programs that Virginia is trying to incorporate into their schools for the next school year. Seeing these models will allow the staffer to see how innovative career and technical education is being delivered and inform future career and technical education legislation.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9/7/16

(Date)

Karishma Merchant

(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Tim Kaine hereby authorize Karishma Merchant
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☒

9/7/16

(Date)

Tim Kaine
(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

-
1. Sponsor(s) of the trip (please list all sponsors): Alliance for Excellent Education
 2. Description of the trip: A site visit and demonstration for federal and national policy experts to visit and tour California Linked Learning high schools.
 3. Dates of travel: October 17-19, 2016
 4. Place of travel: Los Angeles, CA
 5. Name and title of Senate invitees: (see addendum)
 6. I *certify* that the trip fits one of the following categories:
☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

OR

☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
 7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

AND

☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
 8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.

AND

☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

☒ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

- OR -

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

Two overnight stays are required because the event will take place in California, and the distance and travel time required is lengthy and warrants a second night.

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Alliance for Excellent Education will invite and convene attendees, arrange, travel, compile the event agenda, and help to facilitate all event activities taking place on October 18, 2016 in Los Angeles, CA.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Alliance for Excellent Education is a national policy and advocacy organization that is dedicated to ensuring that all students graduate from high school prepared for postsecondary education. The Linked Learning approach to education in California closely aligns with the Alliance's mission

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Alliance sponsored its first trip in September of 2014 to Porterville, CA. We took a group of congressional staffers to visit Linked Learning implementation in Porterville Unified School District, September 24-26, 2014.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Alliance encourages the development and implementation of federal and national policies that support effective high school reform. It works to synthesize and distribute research and information about promising practices that informs national discourse.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$800	\$700	\$220	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip involves an event that is arranged and organized without regard to congressional participation

18. Reason for selecting the location of the event or trip

Los Angeles, CA was selected due to the success the selected school sites have had in transforming learning for students and their robust relationships with employers, higher education, and other partners.

19. Name and location of hotel or other lodging facility:

W Hotel Hollywood, 6250 Hollywood Boulevard, Hollywood, CA 90028

20. Reason(s) for selecting hotel or other lodging facility:

This hotel was selected as the host hotel for the event because it was available on the event date, it offers the required meeting room accommodations, and is in close proximity to both school sites we will be visiting.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The federal per diem rates for Los Angeles are \$150/night for lodging and \$64/day for MIE. The rates

above are higher than the federal per diem rates. However, based on the accommodations required to

accommodate all guests and activities corresponding with this event, these are the anticipated expenses.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Coach transportation will be provided.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: Bob Wise

Name and Title: Bob Wise, President

Name of Organization: Alliance for Excellent Education

Address: 1201 Connecticut Avenue, NW, Suite 901, Washington, DC 20032

Telephone Number: (202) 261-9864

Fax Number: (202) 828-0821

E-mail Address: malmond@all4ed.org (contact: Monica Almond)

PRIVATE SPONSOR TRAVEL CERTIFICATE FORM

Sponsor: Alliance for Excellent Education

Event Date: October 18, 2016

Question 5—Name and title of Senate invitees:

Staffer Invitee	Office
Karishma Merchant	Sen. Tim Kaine
Brian Moulton	Sen. Tammy Baldwin
Megan Harrington	Sen. Rob Portman
Dan Auger	Sen. Kelly Ayotte
Dana Richter	Sen. Shelly Moore Capito
Brett Layson	Sen. Johnny Isakson
Joshua Delaney	Sen. Elizabeth Warren
Amanda Beaumont	Sen. Patty Murray
Allie Kimmel	Sen. Patty Murray
Sarah Bolton	Sen. Patty Murray
Scott Cheney	Sen. Patty Murray
Leanne Hotek	Sen. Patty Murray
Jared Solomon	Sen. Bob Casey
William Knudsen	Sen. Lamar Alexander
Lindsay Fryer	Sen. Lamar Alexander
Peter Oppenheim	Sen. Lamar Alexander
Steve Townsend	Sen. Mike Enzi

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ALLIANCE FOR
EXCELLENT EDUCATION

**The Linked Learning Approach to Preparing Students for College and a Career:
Site Visit to Los Angeles Unified School District
Los Angeles, CA**

*W Hotel Hollywood
6250 Hollywood Boulevard
Los Angeles, CA 90028
Phone: (323) 798-1300*

Tuesday, October 18, 2016

Preliminary AGENDA

7:00-7:45am	Breakfast: Welcome & Introduction Bob Wise, President, Alliance for Excellent Education
8:30-9:30am	District Welcome STEM Academy at Helen Bernstein High School 1309 N. Wilton Place, Los Angeles, CA Esther Soliman, Linked Learning Administrator, LAUSD Christopher Cabaldon, Executive Director, Linked Learning Alliance Bob Wise, President, Alliance for Excellent Education
9:30-9:50am	An Overview of Linked Learning Gary Hoachlander, Ph.D., President, ConnectEd: The California Center for College and Career
	The Equity Imperative Tameka McGlawn, Ph.D., Director, Equity and Impact, ConnectEd
9:50-10:05am	Linked Learning Implementation at STEM Paul Hirsch, Principal
10:05-10:15am	Break
10:15-10:45am	Classroom Tours
10:45-11:30am	Student Project-based Demonstration

11:40-12:00pm	Travel to Site #2: Los Angeles High School of the Arts (LAHSA) 701 S. Catalina Street, Los Angeles, CA (213) 480-4600
12:00-1:00pm	Luncheon Welcome at LAHSA Los Angeles High School of the Arts (Robert F. Kennedy Community Schools) 701 S. Catalina Street, Los Angeles, CA
	Linked Learning Implementation at LAHSA Susan Canjura, Principal
	Panel Presentation with Linked Learning Stakeholders
1:00-1:15pm	Q&A with Linked Learning Stakeholders
1:15-1:45pm	Table Discussion with Linked Learning Stakeholders & Practitioners
1:45-2:00pm	Break
2:00-2:40pm	Classroom Tours
2:40-3:25pm	Student Project-based Demonstration
3:25-3:40pm	Break
3:45-4:45pm	Implications for Policy Phillip Lovell, Vice President of Policy and Advocacy, All4Ed Christopher Cabaldon, Executive Director, Linked Learning Alliance Gary Hoachlander, President, ConnectEd
4:45 – 5:15 pm	Q&A
5:15-5:30pm	Closing Remarks
6:00-8:00pm	Dinner

Sample Itinerary

(Roundtrip Flight via American Airlines)

Monday, October 17th: leaves Reagan Washington National Airport at 5:39pm and arrives into Los Angeles International Airport at 8:20pm

Wednesday, October 19th: leaves Los Angeles International Airport at 8:30am and arrives into Reagan Washington National Airport at 4:41pm.

Merchant, Karishma (Kaine)

From: Bob Wise <rwise@all4ed.org>
Sent: Tuesday, August 23, 2016 9:50 AM
To: Merchant, Karishma (Kaine)
Cc: Monica Almond
Subject: California Linked Learning Site Visit - October 18, 2016
Attachments: 101816Linked Learning FULL Site Visit Invitation (Staffer) FINAL.pdf

Follow Up Flag: Follow up
Flag Status: Flagged

August 23, 2016

Dear Karishma:

The Alliance for Excellent Education (the Alliance) invites you to participate in a site visit demonstrating Linked Learning, a systemic approach to high school reform that aligns the high school experience with in-demand industry sectors and occupations. The site visit will include visits to two high schools in the Los Angeles Unified School District (LAUSD) in Los Angeles, California on **Tuesday, October 18, 2016**. The Alliance will pay for the cost of your travel for this site visit. Logistical information is included following this invitation.

More than 65,000 students in California are participating in Linked Learning, an approach to education that transforms the traditional high school experience by integrating rigorous academics, career technical education, work-based learning, and supports for students. Linked Learning creates meaningful learning experiences through career-themed pathways in fields such as engineering, health care, performing arts, and law through collaborations with local education agencies, employers, higher education institutions, and other community partners. Evidence demonstrates that students participating in certified Linked Learning pathways have higher graduation rates and are more likely to enroll in college with the knowledge and skills that will prepare them for the twenty-first century. Although the Linked Learning approach originated in California, it is now being implemented in other school districts across the country.

I invite you to view first-hand the impact of the Linked Learning approach in Los Angeles Unified School District (LAUSD), home to 640,000 students, 81 percent of whom are from low-income families and 90 percent of whom are students of color. LAUSD offers more than forty Linked Learning pathway options to students and is the recipient of the federal Youth CareerConnect grant, which expanded the district's ability to collaborate with community colleges and employers through initiatives, such as dual-enrollment and work-based learning opportunities, to ensure that more students are graduating from high school ready for college and a career.

This invitation is extended to you or an appropriate designee. Please respond to Monica Almond at malmond@all4ed.org by **Tuesday, September 6** so that we can work with you to get Ethics Committee approval. I hope you are available to participate and learn about one of the nation's most promising efforts to prepare today's students for the twenty-first-century economy.

Respectfully,

A handwritten signature in black ink, appearing to read "Bob Wise". The signature is stylized with a large initial "B" and a cursive "Wise".

Bob Wise
President



The Linked Learning Approach to Preparing Students for College and a Career: Site Visit to Los Angeles Unified School District

Los Angeles, CA • October 18, 2016

W Hotel Hollywood • 6250 Hollywood Boulevard, Los Angeles, CA, 90028 • (323) 798-1300

The goal of this site visit is for participants to learn about Linked Learning, a promising, systemic high school reform strategy that prepares students for postsecondary education and high-wage careers in in-demand industry sectors. Invited participants include congressional staff, U.S. Department of Education staff, and state-level practitioners and policymakers. Participants will visit two schools within Los Angeles Unified School District (LAUSD)—STEM Academy at Helen Bernstein High School and Los Angeles High School of the Arts (LAHSA) at the Robert K. Kennedy Community Schools—to learn about the approach firsthand from students, teachers, administrators, and other partners involved in Linked Learning. Participants will also learn about state and federal policies, such as the Carl D. Perkins Career and Technical Education Act, that are currently supporting the Linked Learning approach and can scale up high-quality career academy models.

LAUSD received \$7 million in Youth CareerConnect funding through the U.S. Department of Labor to provide high school students with education and training that combines rigorous academics and technical curricula focused on in-demand occupations and industries in the science, technology, engineering, and mathematics (STEM) fields. Six pathways are benefiting from this funding, one of which will be showcased during this site visit—STEM Academy.

Los Angeles High School of the Arts (LAHSA) is a wall-to-wall^[1] Linked Learning high school that instructs students in the performing and technical arts with 428 students enrolled in School Year (SY) 2015–16. Since LAHSA became a Linked Learning–certified site in SY 2010–11, its students have shown tremendous growth. During SY 2015–16, LAHSA students overall outperformed their LAUSD peers in English language arts by 16 percentage points, and economically disadvantaged students at LAHSA outperformed their LAUSD peers by 13 percentage points. Additionally, LAHSA has a four-year adjusted cohort graduation rate that is 5 percentage points higher than LAUSD.

STEM Academy is also a wall-to-wall Linked Learning high school and a Youth CareerConnect beneficiary housed within Helen Bernstein High School. All of the nearly 600 STEM students are enrolled in either the medicine or engineering pathway. Students at STEM are outperforming their peers across several indicators. Overall, they outperform their Bernstein peers in math by almost 10 percentage points, while economically disadvantaged students at STEM outperform their LAUSD peers by 6 percentage points in math. STEM students are graduating at higher rates (79.6 percent) than their non-Linked Learning peers on campus (70.2 percent), and their LAUSD peers (72.2 percent). Finally, the percentage of STEM students meeting course requirements for admissions to California’s state universities grew substantially over a three-year period—from 33.9 percent in 2013 to 57.7 percent in 2015. Now, more graduating seniors at STEM are meeting these college-ready requirements than their LAUSD peers (51.7 percent) as well as their peers across the state (43.4 percent).



The Linked Learning Approach to Preparing Students for College and a Career: Site Visit to Los Angeles Unified School District (LAUSD)

Tuesday, October 18, 2016

Preliminary Agenda

School #1: STEM Academy at Helen Bernstein High School

School #2: Los Angeles High School of the Arts (LAHSA) (Robert F. Kennedy Community Schools)

8:00 a.m. Travel to School #1: STEM Academy at Helen Bernstein High School
1309 N. Wilton Place, Los Angeles, CA (323)817-6461

8:30 a.m. Welcome
Paul Hirsch, Principal
Bob Wise, *President, Alliance for Excellent Education*
Overview of Linked Learning Implementation in LAUSD
Esther Soliman, *Linked Learning Administrator, LAUSD*
William Bass, *Program and Policy Development Advisor, LAUSD*
Linked Learning Implementation at STEM
Paul Hirsch

9:35 a.m. Classroom Tours

10:20 a.m. Project-Based Demonstration

11:15 a.m. Travel to School #2: LAHSA
701 S. Catalina Street, Los Angeles, CA (213)480-4600

11:45 a.m. Welcome and School Overview
Susan Canjura, *Principal, LAHSA*

12:00 p.m. Lunch and Discussion with LAUSD Community

1:10 p.m. Classroom Tours

2:00 p.m. Project-Based Demonstration

3:00 p.m. Implications for Policy

4:00 p.m. Break

5:00 p.m. Dinner

7:00 p.m. Conclusion of Site Visit

^[1] A wall-to-wall Linked Learning high school enrolls all of its students in Linked Learning pathways.